**AIIM Southwest Chapter Meeting – 3/12/15**

1. Survey Results
   1. Role of SharePoint for Organization
      1. 53% Collaboration
      2. 24% Intranet Content Management
      3. 18% File Share Replacement
   2. Describe the Progress of your SharePoint Implementation
      1. 35% Just about there & moving forward
      2. 29% Progress has stalled somewhat
      3. 18% Struggle to meet our original expectations
   3. Biggest Ongoing Issue for SharePoint
      1. 35% Achieving uniformity of classification & metadata structures
      2. 18% Integration with other systems
      3. 18% Persuading users to manage & share content on SharePoint
   4. Main Lesson you have Learned from SharePoint Implementation
      1. 47% Don’t leave it to IT
      2. 18% Set your IG policies first
      3. 12% Understand implications of metadata & taxonomy
      4. 12% Take ECM/RM training
2. John Mancini Discussion
   1. Most people prefer 3rd party vs customization
      1. Stuck in “Upgrade Hell” when transitioning to new versions
   2. Cloud vs. On-Premises
      1. Tension exists between drawing the line between the two
      2. Lean towards no cloud due to privacy, cost of solutions
         1. Worry about government digging into data
         2. Solution asked of Microsoft: Encryption, with organizations keeping the keys would provide comfort
      3. Applications on-prem and their migration to cloud also an issue
         1. People make initial huge investments to on-prem
         2. People must become hybrid before a full migration to cloud
         3. Costs of migrating will lead most people becoming hybrid, rather than full cloud, for the foreseeable future
      4. Migration also difficult due to company culture
3. 4 SharePoint “Stations”
   1. SharePoint Migration – David Brown
      1. First step is to identify what you are going to migrate (Scope the project)
         1. Ensure that data-cleanup is a separate part of the migration project
         2. Determine size of migration
         3. Determine migration tools and plan your approach
      2. Make sure the environment you are migrating to is ready and meets the requirement for your migration
      3. Develop a change management plan along with your fully thought out migration plan
      4. Establish a contingency plan for unforeseen data that needs to be migrated
         1. Timeline extensions (6 months vs 9 months)
      5. Migrate in stages, make sure plan calls for incremental migration
      6. Begin with day forward posting of transactions and let users select what they really need later
   2. SharePoint Benefits – Mike Alsup
      1. Consistency of set-up enables rapid re-use. For example, people get reassigned in an organization and will be more productive should their new environment match their old one
      2. Add-in products can reduce user time to productivity
      3. Auto-population of metadata enables “findability”
      4. Dashboards enabling snapshots provide a real-time look, leading to more coordination and productivity
      5. Forms enable friendlier capture of data for ERP
   3. SharePoint Governance – Bill
      1. Plan
         1. Select tools appropriately before starting and then move to educational tools explaining the benefits of SharePoint governance
      2. Standards
         1. Get standards in place for tagging
         2. “Enterprise Term Store”
         3. Automate tagging to rely less on the user for proper population of metadata
         4. Security standards must be taken into account
      3. Ongoing Plan
         1. Establish a governance body to handle change requests
         2. Generate a workflow for feedback
         3. Monitor SharePoint governance and adjust as needed
   4. User Adoption – Anne Tulek
      1. Training – there exist generational, other gaps in training that must be addressed
      2. Familiarity – Build a SharePoint interface with familiar concepts for quicker adoption
         1. Lowe’s shopping for Taxonomy
         2. Dropbox for placing documents into files
         3. Etc.
      3. Limit initial choices and add more in over time, “don’t offer a two year old a lot of choice”
      4. Remember users are lazy/busy so make their jobs easy to not disturb their normal workday patterns
         1. Make the correct path the path of least resistance
      5. Executive level and “Cool Kid” factor
         1. Get to trendsetters and revenue generators (Cool Kids)
         2. Adoption by these groups will lead to quicker adoption through the organization as a whole